EFS Reporting and New Principal Investigator Reports
GMUN May 12, 2011
Agenda

• Summary of efforts to date
• Principal Investigator Reports
• Next Priorities
Summary
Reporting Work Group

• Current reporting environment
  – Immediate improvements
  – Support function
  – Production team structure
  – Infrastructure
    • Performance ~ summary tables
    • Usability ~ flattened tables, associate individuals & groups to chart strings, connected Payroll detail to Finance

• New reporting environment
  – Pilot phase
  – Iterative approach
Principal Investigator Focused Reports
(with links & drill-down capabilities – UM Reports)

Sponsored/Non Sponsored Summary Overall

Sponsored Project Summary by Budget Period

Non Sponsored Activity by Fiscal Year

Sponsored Project Activity by Budget or Project Period

Payroll Summary

Transaction Detail
Next Steps

• Apply new functionality created for PI – focused reports to existing UM Reports
• Monitor UMReport performance
• Review, prioritize & address remaining requirements
  – Next phase of enhancements and reports
• Redesign UM Reports Entry Page
• Implement long term process for enhancement identification & prioritization
BI Pilot

• Clarify expectations of pilot phase roles
  – Casual, Moderate or Formal pilot phase participant
  – Ensure participants from each role, group (RRC, Unit Accounting, Analyst, etc.) and type of unit

• Create feedback loop related to pilot

• Train & Communicate

• Run pilot for about 3 months
Sue Paulson
spaul@umn.edu